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Cascade County Resident Attitudes:

Exploring Tourism Development Potential
Montana CTAP 2003-2004

Area of Study: Cascade County



Cascade County Resident Attitudes:

Exploring Tourism Development Potential Montana CTAP 2003-2004

Prepared by

Jim Wilton

Research Report 2004-2
February 2004

Executive Summary

This report presents information about tourism in Cascade County, Montana. The report offers estimated travel volume and traveler characteristics for overnight visitors to Cascade County. The report also includes the results of a 2003 Cascade County resident attitude survey, providing residents' opinions and attitudes regarding tourism and tourism development in the state and in the Cascade area, along with the results of a 2001 statewide survey for comparative purposes.

The Cascade County resident attitude survey was administered to a random sample of 500 Cascade County households in September and October 2003, and to a statewide sample of 1,000 Montana households during the same period in 2001. The survey sequence was initiated by mailing a pre-survey notice letter to all selected households. A week later, the first round of questionnaires was mailed followed by a reminder/thank-you postcard one week later. Two weeks after mailing the postcards, replacement questionnaires were sent to those households who had not yet responded. The final adjusted response rate was 33 percent.

The following bulleted points offer highlights of the 2001/2002 nonresident survey, in addition to the 2003 Cascade County resident attitude survey. A more detailed analysis is found in the remainder of the report for both Cascade County and the state.

Nonresident Visitors (2001/2002 Nonresident Survey Data and 2002 Visitor Estimates):

- In the year 2002, over four million travel groups visited Montana. Of those, about 655,000 groups traveled through Cascade County.
- Over \$1.8 billion was spent statewide in 2002 by nonresident travelers, with an estimated \$64 million spent in Cascade County.
- The largest group of Cascade County travelers was couples (41%), but many also traveled as families or by themselves.
- Overnight visitors to Cascade County were more likely than statewide visitors to stay in a hotel or motel, but stayed in private and public campgrounds at about the same rate.
- The majority (54%) of Cascade County overnight visitors had an annual income of \$60,000 or more, slightly more than statewide visitors.
- Nearly two-thirds (30%) of overnight visitors to Cascade County found the Internet to be the most useful information source to plan their trip, but this was still the single largest most used source.
- Forty-three percent of overnight visitors to Cascade County were in Montana primarily for vacation, while 24 percent were in Montana primarily for business.
- Vacationers in Cascade County were attracted to Montana primarily because of Glacier National Park (30%).
- Shopping was the most popular activity for overnight visitors to Cascade County, followed by visiting Lewis and Clark sites, and wildlife watching.
- Visitors to Cascade County spent the largest portion of their money (23%) on retail sales, followed by accommodations and restaurants.
- Eighty-six percent of visitors to Cascade County had visited Montana before their trip, and 16 percent had previously lived in the state.

Resident Characteristics and Attitudes About Tourism (2003 Resident Attitude Survey):

- Respondents from Cascade County have resided in their community and in the state longer than the statewide respondents (30 versus 24 years).
- Montana natives comprise 58 percent of the Cascade County sample.
- The largest portion (26%) of Cascade County respondents earns their household income in the services sector.

- The majority (69%) of Cascade County respondents feel the tourism industry should have a role equal to other industries in the local economy, yet ranked the industry 6th on a list of eight desired economic development options.
- Most (85%) Cascade County respondents work in places that they perceive to supply little or none of their products or services to tourists or tourist businesses.
- While 14 percent of Cascade County respondents have frequent contact with tourists, over two-thirds (70%) enjoy meeting and interacting with tourists.
- Cascade County respondents show little attachment to their community, especially compared to statewide respondents.
- Regarding population perceptions, Cascade County respondents were mixed as to whether the population in the county is decreasing, increasing, or staying the same.
- Cascade County respondents feel that tourism can enhance their quality of life by improving the condition of job opportunities, however, they feel traffic congestion will be negatively affected.
- The respondents of Cascade County are more supportive of tourism development than the statewide sample.
- Overall economic benefit is perceived as the primary advantage of increased tourism in Cascade County, while no disadvantage is the leading disadvantage.
- About half (49%) of Cascade County respondents either take or suggest to family and friends to visit the Lewis and Clark Interpretive Center.
- Respondents think that outdoor recreation attractions have the greatest potential for attracting more visitors to the area.
- Music concerts and festivals are the kinds of future arts and cultural activities residents think could attract more visitors.
- The most common impression respondents have of downtown Great Falls is the poorly designed parking and streets.
- A majority (62%) of residents think there are limits or hindrances to tourism development; however, there is little consensus on what those limits or hindrances are.
- Fourteen percent of respondents reported that no areas in the county should be off limits to tourism promotion.

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Introduction

This report is intended to provide a profile of current visitors to Cascade County, as well as resident attitudes regarding tourism and the travel industry in the area. It combines the results of three different studies and is presented in two sections. The first section contains the county-level nonresident visitor profiles, as well as profiles for statewide visitors. The visitor profiles were developed using research conducted by ITRR throughout 2001 and in the fall of 2002. Data from nonresident travelers spending at least one night in Cascade County were used for the profile information.

The second section of this report contains an assessment of resident attitudes toward tourism in Cascade County. This assessment is the result of a mail-back survey obtained from households throughout the county in the fall of 2003. It is provided side by side with the same inquiries collected at the state level in 2001 to provide a comparison between resident opinions toward tourism in Cascade County and in Montana as a whole.

Information for this report was gathered as part of the Community Tourism Assessment Program (CTAP), which is conducted in three Montana communities each year. Cascade County was selected for the 2003/2004 CTAP, together with the Crow Reservation in Big Horn County, and Wibaux County.

Funding for this research came from Montana's Lodging Facility Use Tax. Copies of this report can be downloaded from ITRR's web site (www.itrr.umt.edu) at no charge.

Section 1: The 2001/2002 Nonresident Travel Study

Methodology

Travelers to Montana during the 2001 travel year (December 1, 2000 - November 30, 2001) and the fall of 2002 (October 1 – November 30, 2002) were intercepted for the 2001/2002 Nonresident Travel Study. The traveler population was defined as those travelers entering Montana by private vehicle or commercial air carrier during the study period, and whose primary residence was not in Montana at the time. Specifically excluded from the study were those persons traveling in a plainly marked commercial or government vehicle such as a scheduled or chartered bus, or semi truck. Also excluded were those travelers who entered Montana by train. Other than these exceptions, the study attempted to assess all types of travelers to the state.

Data were obtained through a mail-back diary questionnaire administered to a sample of intercepted travelers in the state. During the fourteen-month study period, 11,996 questionnaires were delivered to visitor groups (Table 1). Usable questionnaires were returned by 4,595 groups, resulting in a response rate of 38 percent. Of those groups, 4,082 reported spending the night in Montana and this analysis reflects the responses from these overnights. A sub-sample of 830 respondent groups traveled through Cascade County with 232 staying overnight.

Table 1: 2001/2002 Nonresident Travel Study Sample Sizes and Response Rates

Questionnaires delivered	11,996
Usable questionnaires returned	4,595
Nonresident Travel Study response rate	38%
Overnight visitors	4,082
Cascade County sample size (drove through county)	830
Percent of nonresident sample	18%
Cascade County overnights (spent at least 1 night in county)	232

A Profile of Recent Montana Visitors

This section presents a profile of Montana visitors from the 2001/2002 nonresident survey. Group characteristics are reviewed for both statewide visitors as well as travelers to Cascade County. In addition, a brief economic profile highlights the spending contributions nonresidents make in Cascade County and throughout Montana.

Group Characteristics

Travel group characteristics for Cascade County were obtained from visitors who spent at least one night in the area. There were several differences between the travel groups staying overnight in Cascade County and the statewide sample (Table 2).

Cascade County: The largest group of visitors who spent at least one night in Cascade County traveled as couples (41%), while 25 percent traveled with family and 24 percent traveled alone. Eighty-six percent of travelers had visited Montana before this trip, while 16 percent had previously lived in the state. Visitors stayed in the state for an average 6.2 nights with the majority (56%) of whom spending their nights at a hotel, motel, or bed and breakfast. More than half (54%) of respondents indicated having an income of over \$60,000 per year, with 18 percent making over \$100,000 and only 4 percent making less than \$20,000.

Statewide: For visitors to the state as a whole, the largest portion traveled as couples as well (40%), followed by those who traveled as family (28%), and 18 percent who traveled alone. Eighty percent were repeat visitors, while 17 percent had previously lived in the state. A typical overnight visitor to Montana was most likely to stay in a hotel or a motel (47%), stay 4.4 nights, and have an income exceeding \$60,000 per year. A full 20 percent indicated making over \$100,000 per year, while 7 percent reported making less than \$20,000 per year.

Table 2: Characteristics of Nonresident Visitors

	Cascade County*	Statewide
Group Type**		
Couple	41%	40%
Family	25%	28%
Alone	24%	18%
Friends	5%	6%
Family & friends	1%	4%
Business associates	4%	2%
Organized group	—	1%
Have previously visited Montana	86%	80%
Have previously lived in Montana	16%	17%
Nights spent in Montana	6.2	4.4
Accommodations used in Montana**		
Hotel, motel, B&B	56%	47%
Home of friend or relative	18%	17%
Private campground	14%	14%
Public campground	8%	10%
Private cabin/2 nd home	1%	4%
Rented cabin/home	<1%	2%
Other	3%	6%
Income**		
Less than \$20,000	4%	7%
\$20,000 to \$39,999	14%	17%
\$40,000 to \$59,999	28%	25%
\$60,000 to \$79,999	22%	20%
\$80,000 to \$99,999	14%	11%
Over \$100,000	18%	20%

Source: ITRR 2001/2002 Nonresident Travel Study.

* Characteristics of Montana visitors who stayed at least one night in Cascade County.

** Percentages may not add to 100 due to rounding.

Origin of Nonresident Visitors: Visitors to the state as well as to Cascade County were from a variety of origins (Table 3). Visitors to Cascade County came primarily from Alberta (12%), followed by Washington (11%), and North Dakota (8%). For statewide visitors, Washington (13%) was the most common state of origin, then California (7%), and Alberta and Minnesota (6% each).

Table 3: Top Five Places of Origin of Montana Nonresident Visitors

Rank*	Cascade County	Statewide
1	Alberta (12%)	Washington (13%)
2	Washington (11%)	California (7%)
3	North Dakota (8%)	Alberta, Minnesota (6%)
4	California (6%)	Idaho, N. Dakota, Wyoming (5% each)
5	Minnesota (4%)	Colorado, Oregon (4%)

Source: ITRR 2001/2002 Nonresident Travel Study.

* 1=highest frequency of responses

Information Sources

Nonresident travel groups indicated which information sources were used as planning tools for their trip *prior* to arriving in Montana, as well as while they were *visiting* Montana. Also, respondents indicated which of the sources were most useful to them. A list of nine pre-trip and five Montana information sources was included in the questionnaire (Tables 4 and 5).

Cascade County: The three most frequently used sources of travel information prior to visiting Montana were the Internet (37%), auto clubs (27%), and 17 percent used information from private businesses (Table 4). One-third (33%) of visitors to Cascade County did not use any of the listed sources prior to their trip. The *most useful* sources of travel information were, again, the Internet (30%), auto clubs (23%), and information from private businesses (15%).

Statewide: For statewide travelers, 37 percent used the Internet, 23 percent used an auto club, and 14 percent used National Park brochures prior to visiting Montana. Forty-one percent of statewide visitors did not use any of the nine listed information sources prior to travel. The *most useful* sources of information included the Internet (39%), auto clubs (24%), and information from private businesses (9%).

Table 4: Sources of Information Used *Prior* to Visiting Montana

Information Sources	Cascade County		Statewide	
	All Sources*	Most Useful Source**	All Sources*	Most Useful Source**
The Internet	37%	30%	37%	39%
Auto club	27%	23%	23%	24%
Information from private businesses	17%	15%	9%	9%
National Park brochure	16%	3%	14%	7%
Travel guide book	15%	8%	10%	8%
Montana Travel Planner	13%	11%	8%	5%
Chamber or visitor bureau	10%	7%	8%	4%
Travel agency	5%	4%	4%	3%
1-800 State travel number	2%	--	1%	1%
None of the sources	33%	N/A	41%	N/A

Source: ITRR 2001/2002 Nonresident Travel Study.

* Visitors could indicate more than one information source.

** Percentages may not add to 100 due to rounding.

Cascade County: Visitors were also asked where they received travel information during their trip in Montana (Table 5). Travel information sources that were used included service people (39%), brochure racks (34%), and highway information signs (38%). However, 33 percent used none of the sources listed. Visitors also indicated what source was the *most useful* while traveling in Montana. Thirty percent of respondents reported that service people were most useful, while other respondents chose brochure racks, visitor information centers, and highway information signs (22% each).

Statewide: The most common information source for statewide travelers while visiting Montana was highway information signs (32%), followed by service people (29%), and brochure racks (24%). More than one-third (39%) indicated that they did not use any of the information sources listed. Of the *most useful* sources of information used while in Montana, statewide visitors chose highway information signs (26%), service people (25%), and visitor information centers (23%).

Table 5: Sources of Information Used While Visiting Montana

	Cascade County		Statewide	
	All Sources*	Most Useful Source**	All Sources*	Most Useful Source**
Service person (motel, restaurant, gas station, etc.)	39%	30%	29%	25%
Brochure racks	34%	22%	24%	16%
Highway information signs	32%	22%	32%	26%
Visitor information center	29%	22%	22%	23%
Billboards	11%	2%	12%	5%
None of these sources	33%	3%	39%	6%

Source: ITRR 2001/2002 Nonresident Travel Study.

*Visitors could indicate more than one information source.

** Percentages may not add to 100 due to rounding.

Purposes of Trip to Montana

Nonresident travel groups were asked about their reasons for traveling to Montana. Many visitors had more than one reason, and were thus asked to identify their *primary* reason for coming to the state as well (Table 6).

Cascade County: Nearly two-thirds (64%) of Cascade County visitors indicated that vacation was one reason for traveling to Montana. Just over one-third (35%) were visiting family or friends, and 27 percent were traveling for business. With respect to their *primary* reason for visiting the state, 43 percent were on vacation while 24 percent were in Montana primarily for business. Fewer travelers were in the state primarily for visiting family and friends or just passing through (14% each).

Statewide: A majority (62%) of statewide visitors cited vacation as one reason for their trip to Montana. Also mentioned were passing through (34%), and visiting family or friends (29%). Statewide travelers most frequently cited vacation (43%) as their *primary* reason for visiting Montana. Passing through the state (26%) and visiting family or friends (16%) were also indicated as primary reasons.

Table 6: Reasons for Traveling to Montana

	Cascade County		Statewide	
	All Reasons*	Primary Reason**	All Reasons*	Primary Reason**
Vacation	64%	43%	62%	43%
Visit family or friends	35%	14%	29%	16%
Business	27%	24%	11%	9%
Passing through	23%	14%	34%	26%
Shopping	7%	1%	8%	2%
Other	6%	4%	7%	5%

Source: ITRR 2001/2002 Nonresident Travel Study.

* Visitors could indicate more than one reason.

** Percentages may not add to 100 due to rounding.

Montana Attractions

Respondents who indicated that one purpose for their trip was vacation were asked what attracted them to Montana as a vacation destination. They were asked to check all pertinent attractions, and then indicate one *primary* attraction (Table 7).

Cascade County: Many Cascade County vacationers were attracted by more than one of the state's many features. The top Montana attractions were Glacier National Park (37%), mountains (36%), and open space (30%). Glacier National Park (30%) was the most popular *primary* attraction for Cascade County, followed by visiting family and friends (13%), and open space (11%).

Statewide: Statewide visitors were also attracted to Montana for many reasons. The top attractions to Montana included the mountains (35%), Yellowstone National Park (31%), and open space (29%). The most frequently cited *primary* Montana attractions for statewide visitors were Yellowstone National Park (20%), Glacier National Park (16%), and visiting family and friends (13%).

Table 7: Attractions of Montana as a Vacation Destination

	Cascade County		Statewide	
	Attractions*	Primary Attraction**	Attractions*	Primary Attraction**
Glacier National Park	37%	30%	21%	16%
Mountains	36%	7%	35%	10%
Open space	30%	11%	29%	11%
Rivers/lakes	25%	2%	24%	1%
Lewis and Clark	23%	6%	7%	1%
Yellowstone National Park	22%	6%	31%	20%
Wildlife	21%	1%	20%	1%
Visiting family and friends	20%	13%	17%	13%
Camping	13%	1%	14%	2%
Other Montana history	11%	6%	8%	3%
Northern Great Plains	10%	—	6%	<1%
Hiking	9%	—	13%	<1%
Native American culture	8%	<1%	6%	1%
Fishing	7%	1%	11%	4%
Special events	6%	6%	5%	4%
Hunting	2%	4%	3%	5%
Other	5%	5%	7%	7%

Source: ITRR 2001/2002 Nonresident Travel Study.

* Visitors could indicate more than one attraction.

** Percentages may not add to 100 due to rounding.

Differences in vacation attractions indicate that statewide visitors generally prefer Yellowstone National Park by larger margins, while Cascade County vacationers prefer Glacier National Park. Cascade County vacationers also show a larger interest in Lewis and Clark than all Montana visitors-*

Visitor Activities

In addition to being queried about attractions, respondents were asked about the kinds of recreation activities they engaged in while visiting Montana. Some differences can be seen among the activities participated in by statewide visitors and by overnight visitors to Cascade County (Table 8).

Cascade County: For Cascade County visitors, shopping (44%) was the most popular recreation activity. Other popular activities included visiting Lewis and Clark sites (34%), wildlife watching (33%), day hiking (20%), and visiting other historic sites (32% each).

Statewide: For all visitors to the state, shopping (37%) also topped the list of recreation activities. Wildlife watching (29%) was popular as well, as was day hiking (26%), visiting other historic sites (23%), and picnicking (22%).

Table 8: Recreation Activity Participation

	Cascade County*	Statewide*
Shopping	44%	37%
Visiting Lewis and Clark sites	34%	13%
Wildlife watching	33%	29%
Day hiking	32%	26%
Visiting other historic sites	32%	23%
Visiting museums	31%	16%
Camping (developed area)	24%	19%
Picnicking	22%	22%
Visiting Native American sites	19%	12%
Gambling	18%	8%
Nature studies	14%	9%
Fishing	13%	13%
Special event/festivals	10%	9%
Golfing	8%	5%
Camping (primitive areas)	5%	8%
River floating/rafting	5%	5%
Road Biking	5%	3%
Off-road/ATV	4%	2%
Canoeing/kayaking	3%	3%
Sporting event	3%	3%
Backpacking	2%	3%
Motor boating	2%	3%
Mountain Biking	1%	2%
Water skiing	<1%	1%
Sailing/windsurfing	--	<1%

Source: ITRR 2001/2002 Nonresident Travel Study.

* Visitors could indicate more than one activity.

This activity list indicates that Cascade County travelers are slightly more involved in recreation activities than the statewide visitors. This may be due, in part, to Cascade County visitors staying in the state longer than statewide visitors. Also, Cascade County has fewer visitors passing through which gives them more time to participate in more activities.

Economic Characteristics

Information about the number of visitors to an area and how much they spend during their visit is useful for planning purposes. While the preceding travel group characteristics are based only on groups who spent a night in Cascade County or the state, economic information is more inclusive and represents all groups who spent money in the county or the state throughout the entire year (Table 9).

Cascade County: Nonresident spending in Cascade County was nearly \$64 million in 2002, less than four percent of all nonresident spending in Montana. Nonresidents in the county spent the equivalent of \$806 per county resident, which is less than half (41%) of the state per-capita average. About 655,000 travel groups (2.2 people per group) visited Cascade County, which represents over 16 percent of all travel groups to Montana. Cascade County's 2002 population is about nine percent of the state's.

Statewide: Nonresident visitors were comprised of over four million travel groups (2.4 people per group) and spent \$1.8 billion in the state in 2002. This amounted to a little more than \$1,979 per state resident.

Table 9: Expenditures by Nonresident Travelers

Distribution of Expenditures	Cascade County*	Statewide*
Retail sales	23%	21%
Lodging, campgrounds, etc.	19%	12%
Restaurant, bar	19%	20%
Gas, oil	18%	22%
Auto rental and repair, transportation	9%	7%
Groceries, snacks	9%	8%
Licenses, entrance fees	2%	3%
Guides, outfitters	--	4%
Miscellaneous expenses, services	1%	2%
Total expenditures in sample area, 2002	\$63,962,000	\$1,800,000,000
Total travel groups to sample area, 2002	655,000	4,009,000
Travel group size (persons)	2.2	2.4
Population (2002 census estimate)	79,389	909,453
Per capita expenditures in sample area, 2002	\$806	\$1,979

Source: ITRR 2001/2002 Nonresident Travel Study; U.S. Census Bureau, 2004¹.

* Economic information updated 01/07/04; percentages may not add to 100 due to rounding.

Differences in expenditure distribution show that Cascade County visitors spend a larger portion of their money on accommodations and retail sales than statewide visitors. On the other hand, they spend less on gas and oil than statewide visitors. These differences could indicate that Cascade County visitors enjoy staying and traveling locally since they stay longer (1.8 more nights) and have larger business traveler percentages than statewide visitors.

¹ U.S. Census Bureau, 2004. Montana County Population Estimates: April 1, 2000 to July 1, 2002.
<<http://eire.census.gov/popest/data/counties/tables/CO-EST2002/CO-EST2002-01-30.php>> Accessed January 7, 2004.

Section II: The Resident Attitude Study

Methodology

In an effort to help understand how residents feel about tourism and its impacts, a resident attitude survey was conducted. In the fall of 2003, a mail-back questionnaire was administered to a sample of Cascade County residents. A similar survey (although lacking Cascade County-specific questioning) was distributed to a statewide sample in the fall of 2001 and those results are reported here as well. The distribution followed Dillman's Tailored Design Method (TDM)² to ensure maximum response rates. The 2001 state survey achieved a response rate of 40 percent, while in 2003 the Cascade County resident attitude survey achieved 33 percent response.

The survey administration sequence was initiated by mailing a pre-survey notification letter to a random sample of 500 Cascade County households³, as well as 1,000 Montana households in 2001. The letter informed recipients of the upcoming survey and alerted them to the appearance of a questionnaire in their mailbox in the near future. A week later, a questionnaire was mailed to the same households, along with a cover letter from the local CTAP working group and a cover letter from ITRR stating in more detail the purpose and nature of the study.

One week following the questionnaire mailing, a postcard was sent to all selected households. This served the dual purpose of thanking respondents for their efforts if they had already returned their questionnaire, and reminding those who had set it aside to complete it and return it in the postage-paid return envelope. After two more weeks, replacement questionnaires were sent to those households that had not yet responded to the first questionnaire mailing. Included this time was a different cover letter addressing some concerns respondents may have had that kept them from responding. The cut-off day for accepting returned questionnaires was four weeks following the last mailing. The survey instrument is included in Appendix A.

A non-response bias check was not conducted at the conclusion of the sampling effort. Such bias checks often take the form of a telephone interview to determine if those in the sample who did not respond to the questionnaire differ on key issues from those who did respond. In this case, the key questions where opinions may have differed involve statements of support for tourism development. These key questions could only be answered after considering other questions asked in the survey. It was therefore not possible to develop a condensed telephone non-response questionnaire.

The reader is cautioned to bear in mind that the results presented are the opinions of only 33 percent (138 households) of the Cascade County residents polled (Table 10). It is assumed that respondents did not differ from non-responders in their opinions.

Because the age distribution of the survey respondents differed from the 2000 Montana census estimates of age groups⁴, responses were weighted to more closely reflect the population of Cascade County. The results presented in this report reflect the adjusted dataset, with the exception of the open-ended questions.

Table 10: Resident Attitude Survey Sample Sizes and Response Rates

	Cascade County	Statewide
Original sample size	500	1,000
Undeliverable questionnaires	77	189
Deliverable questionnaires	423	811
Completed questionnaires	138	328
Adjusted response rate	33%	40%

² Dillman, Don A., 2000. *Mail and Internet Surveys: The Tailored Design Method*. John Wiley & Sons, Inc. New York, NY.

³ The sample of 500 household addresses was purchased from Survey Sampling, Inc. in September 2003.

⁴ U.S. Census Bureau, 2004. Table QT-P1 Age Groups and Sex, 2000.

<<http://factfinder.census.gov/servlet/QTTable?geo_id=04000US30&ds_name=DEC_2000_SF1_U&q_ name=DEC_2000_SF1_U_QTP1&lang=en&_sse=on>> Accessed January 7, 2004.

Cascade County Resident Attitudes

When a community pursues tourism as a development strategy, the goals of that effort can often include an improved economy, more jobs for local residents, community stability, and ultimately, a stable or improved quality of life for the community's residents. On the other hand, negative impacts can also result from tourism development strategies that are not carefully considered. Understanding residents' perceptions of the conditions of their surroundings and tourism's influence on those conditions can provide guidance toward appropriate development decisions.

Residents of an area may hold a variety of opinions about tourism and other forms of economic development. They may have both positive and negative perceptions of the specific effects of tourism. Attitudes and opinions are good measures for determining the level of support for community and industry actions. The resident attitude questionnaire addressed topics that provide a picture of perceived current conditions and tourism's potential role in the community.

Respondent Characteristics

In this section, several respondent demographic details are reported for Cascade County residents and the statewide respondents. In the first table, respondents were asked to indicate their gender as well as their age (Table 11).

Cascade County: The average age for Cascade County respondents was 48 years, with an age range of 24 to 91 years. Fifty-two percent of respondents were male.

Statewide: For statewide residents, the average age was 47 years, with ages ranging from 18 to 94 years. Fifty-three percent were male, compared to the actual statewide census of 50 percent.

Table 11: Age and Gender Characteristics

	Cascade County	Statewide
Average age	48 years	47 years
Minimum age	24 years	18 years
Maximum age	91 years	94 years
Percent male	52%	53%
Percent female	48%	47%

Survey participants were asked if they were born in Montana, as well as how long they had lived in their state and in their community. Cascade County respondents were asked how long they had lived in the county (Tables 12 and 13).

Cascade County: Fifty-eight percent of Cascade County respondents were native Montanans (Table 12). On average, they had lived in Cascade County for 30 years and in the state for 37 years. Forty-five percent of respondents had lived in Cascade County longer than 30 years (Table 13), while less than one-quarter (22%) had lived there 10 years or less.

Statewide: Slightly more than half (53%) of statewide respondents were born in Montana. On average, they had lived in the their community for 24 years and in the state for 33 years. Thirty-four percent had lived in their community longer than 30 years, while 34 percent had lived there for 10 years or less.

Table 12: Residency Characteristics

	Cascade County	Statewide
Born in Montana	58%	53%
Mean years lived in county	30 years	24 years
Mean years lived in Montana	37 years	33 years

Table 13: Community Residency

	Cascade County*	Statewide*
10 years or less	22%	34%
11 to 20 years	13%	16%
21 to 30 years	21%	16%
31 to 40 years	16%	13%
41 to 50 years	14%	11%
51 to 60 years	4%	3%
61 years or more	11%	7%

* Percentages may not add to 100 due to rounding.

Employment status, job type, and sector of employment can all influence levels of support for tourism development. Therefore, it is likely that the more dependent a person is financially on the travel industry, the greater their support for tourism (Table 14).

Cascade County: The largest portion of respondents derive their income from the services sector (26%), followed by wholesale/retail trade (24%), and health care (23%). Other sizeable income sources included professional occupations (22%), construction, and the travel industry (12% each). Of the 12 percent who indicated that they were employed in the travel industry, however, employees in the service and retail sectors are likely to be part of this industry as well.

Statewide: The most common sources of household income for statewide respondents were the education and service sectors (18% each). Other sources of household income included health care (17%), wholesale/retail trade, and professional (15% each). Approximately three percent of statewide households derived some portion of their household income from the travel industry. As may be the case for Cascade County, some of the statewide respondents who indicated that they are employed in the service and retail sectors may in fact be part of the travel industry.

Table 14: Source of Household Income

Sector	Percent of households deriving income from sector*	
	Cascade County	Statewide
Services	26%	18%
Wholesale/retail trade	24%	15%
Health care	23%	17%
Professional	22%	15%
Construction	12%	13%
Travel industry	12%	3%
Restaurant or bar**	10%	6%
Clerical	9%	7%
Finance, Insurance or Real Estate (FIRE)	8%	6%
Transportation, communication or utilities	5%	8%
Armed Services	4%	4%
Education	4%	18%
Agriculture	3%	13%
Manufacturing	2%	--
Forestry or forest products	--	5%
Other	12%	6%

* Households can earn income from more than one source.

** Contrary to common belief, the "Restaurant/bar" category does not technically belong in the Service sector according to the Standard Industrial Classification index. It is part of the Wholesale/Retail Trade sector in Table 16 as "Eating and Drinking Places". For clarity, it is included here as a separate category.

Seventeen of the Cascade County respondents selected the "other" category and then wrote in their occupation. The most common response was "retired," followed by "volunteer."

Tourism and the Economy

The local economy and the role tourism and the travel industry should have in it were key issues addressed in the survey. Residents were asked how important a role they felt tourism should have in their community's economy. In addition, they ranked industries on a scale from 1 (most desired) to 8 (least desired) indicating which they felt would be most desirable for their community (Tables 15 and 16).

Cascade County: The majority (69%) of Cascade County respondents believe that the travel industry should have a role equal to other industries in the local economy (Table 15), while 15 percent feel it should have a dominant role and another 15 percent feel it should have a minor role. Tourism/recreation ranked sixth as an economic development opportunity for the county in terms of desirability (Table 16), behind technology, wholesale/retail trade, services, agriculture/agribusiness, and manufacturing.

Statewide: Sixty-two percent of statewide respondents feel that tourism should have a role equal to other industries in their local economy. Twenty percent believe the industry should have a minor role while 14 percent favor a dominant role. When ranking tourism along with other industry segments according to economic desirability for the community, it placed fifth, behind services, technology, agriculture/agribusiness, and wholesale/retail trade.

Table 15: Role of Tourism in the Local Economy

	Cascade County	Statewide
No role	2%	4%
A minor role	15%	20%
A role equal to other industries	69%	62%
A dominant role	15%	14%

Table 16: Desirability of Economic Development Alternatives

	Cascade County		Statewide	
	Rank	Mean*	Rank	Mean*
Technology	1	3.05	2	3.42
Wholesale/retail trade	2	3.35	4	3.71
Services	3	3.38	1	3.39
Agriculture/agribusiness	4	3.69	3	3.60
Manufacturing	5	4.15	6	4.51
Tourism/recreation	6	4.59	5	4.22
Wood products	7	6.36	7	5.68
Mining	8	7.41	8	7.09

* Scores represent the mean of responses measured on a scale from 1 (most desired) to 8 (least desired).

Taking both of these tables together, an interesting finding for the Cascade County residents emerges. For instance, 84 percent of the county respondents feel that tourism should have at least an equal role to other industries in the local economy. However, the respondents ranked tourism sixth in desirability which suggests that perceptions of tourism's role in the county are mixed. But that apparent inconsistency seems plausible since many residents agree that tourism should have a role in the economy, yet exactly what form that role takes is less clear.

Dependence on Tourism

Respondents were asked about the degree to which their place of work was dependent on tourists for its business. Their places of employment could provide products and/or services to tourists directly, or to other tourist-related businesses (Table 17).

Cascade County: Fifteen percent of Cascade County respondents indicated that their place of employment provides a majority of their products or services to tourists or tourist businesses. Nearly one-half (48%) reported their work provides part of its products or services to tourism-related customers, while 37 percent work in places that provide none of their products or services to tourists or tourist businesses.

Statewide: Seven percent of statewide respondents work in places that provide a majority of their products or services to tourists or tourist businesses, whereas the largest portion of respondents (48%) is employed in places that provide none. Less than half (45%) work in places that provide part of their products or services to tourism-related customers.

Table 17: Employment's Dependency on Tourists for Business

	Cascade County	Statewide
My place of work provides <u>the majority</u> of its products or services to tourists or tourist businesses.	15%	7%
My place of work provides <u>part</u> of its products or services to tourists or tourist businesses.	48%	45%
My place of work provides <u>none</u> of its products or services to tourists or tourist businesses.	37%	48%

Interactions with Tourists

The extent of interaction between tourists and residents can affect the attitudes and opinions residents hold toward tourism in general. In turn, an individual's behavior may be a reflection of those same attitudes and opinions. Respondents were asked questions to determine the extent to which they interact with tourists on a day-to-day basis as well as how they enjoy those interactions (Tables 18 and 19).

Cascade County: When asked about the frequency of their interactions with tourists (Table 18), 14 percent indicated that they have frequent contact, while 32 percent reported that they have infrequent contact with tourists visiting Cascade County. Regarding attitudes towards tourists visiting their area (Table 19), over two-thirds (70%) enjoy interacting with tourists while 29 percent are indifferent about it. Only two percent of respondents reported that they do not enjoy meeting and interacting with visiting tourists.

Statewide: With a similar distribution to Cascade County respondents, 16 percent of statewide respondents reported having frequent contact with tourists visiting their community. Twenty-seven percent indicated that they have somewhat frequent contact with tourists, and 31 percent said they have infrequent contact. Over two-thirds (68%) of statewide respondents reported that they enjoy meeting and interacting with tourists. Twenty-eight percent are indifferent to meeting and interacting with tourists, while 4 percent do not enjoy these interactions.

Table 18: Frequency of Contact with Tourists Visiting Community

Degree of Frequency	Cascade County	Statewide
Frequent contact	14%	16%
Somewhat frequent contact	25%	27%
Somewhat infrequent contact	30%	26%
Infrequent contact	32%	31%

Table 19: Attitude Toward Tourists Visiting Community

Attitude	Cascade County	Statewide
Enjoy meeting and interacting with tourists	70%	68%
Indifferent about meeting and interacting with tourists	29%	28%
Do not enjoy meeting and interacting with tourists	2%	4%

Community Attachment and Change

One measure of community attachment may be the length of time and portion of life spent in a community or area, and these statistics were reported earlier in the report (Table 12). Other measures may be based on opinions that residents have about their community and perceived changes in population levels.

To help assess community attachment, respondents were asked to indicate their level of agreement with each of three statements on a scale from -2 (strongly disagree) to +2 (strongly agree). A mean response greater than 0 indicates aggregate agreement with the statement in question, and responses with a negative score means some degree of disagreement (Table 20). The larger the absolute size of the mean the stronger the level of agreement or disagreement.

Cascade County: The Index of Community Attachment (i.e., the mean of the scores for the three community attachment statements) indicates that Cascade County respondents are not very attached to their community, at least in terms of this measure. The score of -.12 also suggests these respondents do not necessarily like where they live, especially compared to the statewide respondents. Their biggest concern was about the future of the county.

Statewide: For respondents to the statewide survey, the Community Attachment Index produced a score of .60, which is considerably higher than Cascade County. Furthermore, statewide respondents have higher mean scores for each of the three variables compared to the Cascade County respondents. This suggests that they are much more attached to their communities than Cascade County residents, again, at least in regard to this measure.

Table 20: Index of Community Attachment

	Cascade County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I'd rather live in my community than anywhere else.	17%	34%	44%	5%	-.14	4%	18%	51%	27%	.78
If I had to move away from my community, I would be very sorry to leave.	17%	28%	49%	7%	.01	3%	22%	47%	29%	.76
I think the future of my community looks bright.	17%	38%	43%	3%	-.23	8%	31%	48%	12%	.26
Index of Community Attachment**	-.12					.60				

* Scores represent mean responses measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

** Index scores are the mean of the mean scores for the three community attachment statements.

To assess residents' perceptions regarding population change in their community, respondents were asked to indicate if they perceived the population of their community to be changing. If they perceived any change, respondents then indicated the rate of change (Tables 21 and 22).

Cascade County: Thirty-one percent of Cascade County respondents feel that the town's population is not changing at all, while 33 percent feel it is decreasing and 36 percent felt it is increasing (Table 21). Of those who feel the town's population is changing (Table 22), less than half (41%) feels it is changing too slow and 33 percent feel it is changing too fast. According to the U.S. Census, the population of Cascade County increased by 3.4 percent from 1990 to 2000⁵.

Statewide: On the statewide level, 13 percent of respondents feel that the population of their community is unchanging. Sixty-four percent feel the population is increasing, while 23 percent feel it is decreasing. The largest group (53%) feels that the changes are too fast while less than half (44%) believes the rate of

⁵ MT Department of Commerce, Census and Economic Information Center, 2004. Time Series of Montana Intercensal Population Estimates by County: April 1, 1990 to April 1, 2000. <http://ceic.commerce.state.mt.us/demog/estimate/pop/county/revised_cty_est_9199.pdf> Accessed 01/08/04.

population change is just right. The U.S. Census shows that the statewide population increased by 13 percent between 1990 and 2000⁶.

Table 21: Perceptions of Population Change

	Wibaux County	Statewide
Population is not changing	31%	13%
Population is increasing	33%	64%
Population is decreasing	36%	23%
<i>If you feel the population in your community is changing, how would you describe the rate of change?</i>		
Too fast	33%	53%
About right	27%	44%
Too slow	41%	3%

It is interesting to note the differences in perceptions of population change, especially for Cascade County respondents. Groups of roughly one-third felt the population was not changing, was increasing, and was decreasing at the same time. In addition, for those who thought the county population was either increasing or decreasing, they were split on whether the change was too fast, about right, or too slow. This highlights the contrast with the perceptions of the statewide respondents who shared more consensus on both of the measures.

Quality of Life - Current Conditions and Tourism's Influence

The concept of "Quality of Life" can be broken down into several independent aspects, such as the availability and quality of public services, infrastructure condition, stress factors such as crime and unemployment, and overall livability issues such as cleanliness. When evaluating the potential for community tourism development, it is often desirable to get an understanding of residents' opinions of the current quality of life in their community. This approach helps identify existing problem areas within the community, in turn providing guidance to planners and decision-makers. It is also informative to understand how increased tourism might change residents' perceptions of these current quality of life conditions. Such perceptions often define residents' attitudes toward this type of community development.

To address this, respondents were asked to rate the current condition of a number of factors that comprise their current level of quality of life using a scale ranging from -2 (very poor condition) to +2 (very good condition). They were then asked to rate how they believed increased tourism would influence these factors. The influence of tourism was rated using a scale of -1 (negative influence), 0 (both positive and negative influence), and +1 (positive influence) (Tables 22 and 23).

Cascade County: Cascade County respondents indicated that they are relatively satisfied with the various quality of life variables in their community (Table 22). The items receiving the most favorable ratings were museums and cultural centers (1.32), parks and recreation areas (1.31), and emergency services (1.27). The two items that were rated as in poor condition were conditions of roads and highways (-1.13) and job opportunities (-1.23). Taken together, Cascade County respondents rate these quality of life elements at the same level (.63) as the statewide respondents.

Looking at tourism's potential influence on quality of life (Table 23), museums and cultural centers (.91) received the highest mean score, followed by education system, and job opportunities (.66 each). The two negative potential influences were on the conditions of roads and highways (-.01), and traffic congestion (-.50). On the whole, Cascade County respondents believe that tourism's influence on their quality of life is more positive (.29) than for the statewide respondents (.12).

⁶ Ibid.

Statewide: Statewide respondents were also generally satisfied with the current condition of these quality of life elements (Table 23). Overall livability received the most favorable score (1.27), followed by emergency services (1.19), and park and recreation areas (1.05). Job opportunities received the least favorable score at a -.65.

Table 22: Quality of Life—Current Condition

	Cascade County Mean*	Statewide Mean*
Museums and cultural centers	1.32	.84
Parks and recreation areas	1.31	1.05
Emergency services	1.27	1.19
Education system	1.03	.73
Overall community livability	.95	1.27
Overall cleanliness and appearance	.85	.82
Infrastructure	.76	.56
Safety from crime	.76	1.02
Traffic congestion	.50	.44
Cost of living	.19	.00
Condition of roads and highways	-.13	.31
Job opportunities	-1.23	-.65
Overall Mean	.63	.63

* Scores represent mean responses measured on a scale from -2 (very poor condition) to +2 (very good condition). The higher the score, the better is the perceived condition of the variable.

Statewide respondents expect tourism development to have a positive impact (Table 23) on museums and cultural centers (.82), as well as on job opportunities (.60), and parks and recreation areas (.33). However, negative influence is expected for five conditions including traffic congestion (-.60), safety from crime (-.20), roads and highways (-.09), cost of living (-.06), and infrastructure (-.02). Overall, statewide respondents feel that tourism's influence will be somewhat positive (.12) on their quality of life, but less so than for Cascade County residents (.29).

Table 23: Quality of Life—Tourism's Influence

	Cascade County				Statewide			
	Negative Influence	Positive & Negative Influence	Positive Influence	Mean Score*	Negative Influence	Positive & Negative Influence	Positive Influence	Mean Score*
Museums and cultural centers	1%	7%	92%	.91	1%	16%	83%	.82
Education system	7%	20%	73%	.66	9%	50%	41%	.31
Job opportunities	8%	17%	75%	.66	6%	28%	66%	.60
Parks and recreation areas	7%	36%	58%	.51	13%	40%	47%	.33
Emergency services	10%	44%	46%	.37	16%	56%	28%	.12
Overall community livability	5%	58%	37%	.32	10%	63%	27%	.17
Infrastructure	12%	52%	36%	.24	30%	43%	27%	-.02
Cost of living	20%	40%	40%	.21	28%	49%	23%	-.06
Overall cleanliness and appearance	25%	36%	39%	.14	24%	48%	28%	.03
Safety from crime	21%	58%	21%	.00	36%	49%	15%	-.20
Conditions of roads and highways	31%	39%	30%	-.01	38%	34%	28%	-.09
Traffic congestion	57%	37%	6%	-.50	68%	24%	8%	-.60
Overall Mean	.29				.12			

Percentages may not add to 100 due to rounding.

*Scores represent responses measured on a scale from -1 (negative influence) to +1 (positive influence). The higher the score, the more positive the perceived influence of increased tourism on the condition of the variable.

Considering both the current condition and tourism's influence on quality of life, several interesting differences emerge. For Cascade County residents, the highest scored current condition variable (museums and cultural centers) also received the highest mean score when considering tourism's potential influence upon it. In contrast, one of the higher scored current conditions (safety from crime) for statewide residents became substantially reduced when viewed in terms of the potential influence from tourism. Similarly, current job opportunities scored the lowest for both Cascade County and statewide residents, yet they both scored near the top when influenced by tourism. In sum, Cascade County and statewide residents recognize that there is a tension between their current quality of life, and how tourism can or will influence those qualities. Some of their current quality of life aspects could be negatively influenced (e.g., traffic congestion), yet other aspects could be greatly enhanced (e.g., job opportunities).

Perceived Connections Between Tourism and Community Life

Index of Tourism Support

In addition to tourism's perceived influence on quality of life, another method of measuring the degree of support for tourism development is to ask respondents questions specific to the tourism industry and about interactions with tourists. Respondents were asked to indicate their level of agreement or disagreement with a number of tourism-related statements. Responses ranged from -2 (strongly disagree) to +2 (strongly agree). As before, a positive score indicates agreement, while a negative score indicates disagreement (Table 24).

Cascade County: A vast majority (95%) of Cascade County respondents agree that tourism increases opportunities to meet people of different backgrounds and cultures, while another 90 percent agree that tourism promotion and advertising to out-of-state visitors by the state of Montana is a good idea, and would like to see this continued. Most (85%) of respondents also feel that any negative impacts of tourism are outweighed by its benefits, while another 85 percent feel that tourism promotion by the state benefits their community

economically. Eighty-four percent indicated that they believe increased tourism will help their community grow in the right direction, and 70 percent feel that their community is a good place for tourism investment. Slightly fewer (66%) feel that overall quality of life for Montana residents will improve with increased tourism. Fifty-eight percent believe that jobs in the travel industry offer opportunities for advancement, while less than half (40%) see a connection between increased tourism in the community and a more secure income for themselves. A little more than one-third (37%) think that increased tourism will lead to personal financial benefit. Based on these responses, the Cascade County Index of Tourism Support (i.e. the mean of the average scores for each statement) equals .46; a score that indicates moderate overall support for tourism.

Statewide: On the whole, statewide respondents are less supportive of tourism and the travel industry than Cascade County respondents since the average score for each statement is consistently lower. Eighty-seven percent agree that tourism increases opportunities to meet people of different backgrounds and cultures, while 81 percent support continued tourism promotion and advertisement to out-of-state visitors. Nearly two-thirds (65%) agree that their community is a good place to invest in tourism development. Sixty-five percent think that increased tourism in the state will help their community grow in the right direction, and 71 percent feel that the overall benefits of tourism outweigh any negative impacts. Tourism promotion by the state of Montana is thought by 78 percent to benefit local communities economically, while 49 percent believe tourism jobs offer opportunity for advancement. Fifty-three percent of statewide respondents think that increased tourism in the state will improve residents' quality of life.

Statewide respondents as well feel that tourism development in their community will not influence them personally in an economic way. Only 38 percent see a connection between increased tourism and an increased or more secure income for themselves, and just 30 percent think they will benefit financially if tourism were to increase in their community. However, the statewide responses produced an average score of .25 in the Index of Tourism Support, indicating that on average, Montana residents are somewhat supportive of tourism development.

The perceived lack of connection between tourism development and personal benefit may be one of the main obstacles currently facing this type of development in the state, and also a reason for the very modest score on the Index of Tourism Support by Montana residents. Overall, however, respondents support continued tourism promotion by the state even though they may not see a direct economic benefit from these efforts.

Table 24: Index of Tourism Support

	Cascade County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
Tourism increases opportunities to meet people of different backgrounds and cultures.	2%	4%	82%	13%	1.00	2%	12%	72%	15%	.87
I support continued tourism promotion and advertising to out-of-state visitors by the state of Montana.	3%	7%	76%	14%	.90	7%	12%	63%	18%	.72
Increased tourism would help my community grow in the right direction.	1%	15%	67%	17%	.84	8%	27%	53%	12%	.35
The overall benefits of tourism outweigh the negative impacts.	2%	13%	70%	15%	.81	4%	25%	62%	9%	.47
Tourism promotion by the state of Montana benefits my community economically.	3%	12%	74%	11%	.80	5%	17%	61%	17%	.67
My community is a good place to invest in tourism development.	7%	24%	61%	9%	.42	9%	26%	51%	14%	.37
If tourism increases in Montana, the overall quality of life for Montana residents will improve.	4%	30%	63%	3%	.32	10%	37%	49%	4%	.00
I believe jobs in the tourism industry offer opportunity for advancement.	7%	35%	53%	5%	.15	10%	41%	43%	6%	.00
If tourism increases in my community, my income will increase or be more secure.	9%	52%	38%	2%	-.29	24%	38%	30%	8%	-.39
I will benefit financially if tourism increases in my community.	16%	48%	35%	2%	-.40	25%	45%	25%	5%	-.60
Index of Tourism Support**	.46					.25				

Percentages might not add up to 100% due to rounding.

* Scores represent mean response measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

** The Index of Tourism Support is the overall mean of the mean scores for each statement.

On the whole, Cascade County respondents show more support for tourism than statewide residents. For each statement, the Cascade County response had generally higher agreement than statewide suggesting that they see more of a connection with aspects of tourism development and their community. These more positive perceptions of tourism could help facilitate local efforts in developing tourism-related activities.

Index of Tourism Concern

In addition to asking respondents about their support for tourism, they were queried about some concerns that also affect their attitudes and opinions regarding tourism. Responses ranged from -2 (strongly disagree) to +2 (strongly agree). As before, a positive score indicates aggregate agreement, while a negative score indicates disagreement (Table 25).

Cascade County: The majority (82%) of Cascade County respondents believe that most tourism jobs pay low wages, while 53 percent feel that tourists do not pay their fair share for the services they use. Less than one-third (29%) agree that vacationing in Montana influences too many people to move to the state, and 19 percent feel that out-of-state visitors limit their access to recreation opportunities. Only 14 percent feel the state is becoming too crowded because of tourists, while 86 percent do not. Overall, the Index of Tourism Concern equals $-.24$, which suggests that Cascade County residents do not have many concerns about tourism development in their area.

Statewide: Statewide residents express more concerns about tourism than do Cascade County respondents. The statements score higher for statewide respondents for nearly all the statements, indicating a higher level of concern. Eighty percent feel that tourism jobs pay mostly low wages, while 55 percent feel that tourists do not pay their fair share for the services they use. Fifty-one percent feel that a Montana vacation influences too many people to move to the state. However, less than half (43%) perceives the state as having a problem with crowding due to tourists, and only 36 percent see their recreation opportunities limited by the presence of out-of-state visitors. With these scores taken together, the overall Index of Tourism Concern for statewide residents is $.15$. This score indicates that there is some level of concern regarding tourism development in the state as a whole; however, the concern on this scale is low.

Table 25: Index of Tourism Concern

	Cascade County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I believe most of the jobs in the tourism industry pay low wages.	2%	15%	68%	14%	.77	2%	18%	58%	22%	.79
Tourists do not pay their fair share for the services they use.	9%	39%	41%	12%	.09	4%	41%	38%	17%	.24
Vacationing in Montana influences too many people to move to the state.	13%	59%	19%	10%	-.46	8%	41%	32%	19%	.12
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	13%	68%	14%	5%	-.71	11%	53%	23%	13%	-.27
In recent years, Montana is becoming overcrowded because of more tourists.	16%	70%	11%	3%	-.87	11%	46%	30%	13%	-.12
Index of Tourism Concern**	-.24					.15				

Percentages might not add up to 100% due to rounding.

* Scores represent mean response measured on a scale from -2 (strongly disagree) to $+2$ (strongly agree).

** The Index of Tourism Concern is the mean of the mean scores for each statement.

Index of Land Use Concern

Montana has a rich land heritage that appeals to residents and visitors alike. A large part of Montana's attraction is related to its natural environment and residents are usually sensitive with respect to how this resource is treated. Respondents were asked to express their agreement or disagreement with several statements related to land use issues, with responses ranging from -2 (strongly disagree) to $+2$ (strongly agree). A positive score indicates agreement while a negative score indicates disagreement (Table 26).

Cascade County: Eighty-four percent of Cascade County respondents would support land use regulations to manage growth in the area, while 77 percent agree that there is adequate undeveloped open space in the county. A minority (37%) of respondents are concerned about the potential disappearance of area open

space. Overall, Cascade County residents show modest concern (.34) over the uses of land, less than that of statewide residents.

Statewide: Among statewide respondents, 78 percent would support some form of land-use regulations to control the types of future growth in their community, while 59 percent agree that there is adequate undeveloped open space in their area. More than half (60%) are concerned about the disappearance of open space. An index score of .42 shows that statewide residents have a slightly more concern over the uses of land than Cascade County residents.

Table 26: Index of Land Use Concern

	Cascade County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I would support land use regulations to help manage types of future growth in my community.	5%	11%	71%	13%	.76	7%	15%	57%	21%	.68
There is adequate undeveloped open space in my community.	2%	21%	66%	11%	.61	8%	33%	47%	12%	.21
I am concerned with the potential disappearance of open space in my community.	13%	50%	33%	4%	-.34	7%	33%	37%	23%	.37
Index of Land Use Concern	.34					.42				

Percentages might not add up to 100% due to rounding.

* Scores represent mean responses measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

Advantages and Disadvantages of Tourism Development

To further clarify the perceived benefits and costs of tourism development, respondents were asked what they thought would be the top advantages and disadvantages of increased tourism in their community. These were open-ended questions where respondents provided their thoughts in their own words. The responses were then assigned to general categories to facilitate comparison (Tables 27 and 28).

Cascade County: The top advantage of tourism identified by 53 percent of Cascade County respondents was overall economic benefit (Table 27). Ten percent of residents listed job opportunities, followed by increased development of attractions (5%). Four percent indicated that there were no advantages to increased tourism. In terms of disadvantages (Table 28), 22 percent identified no disadvantages associated with tourism growth, followed by increased traffic (15%), crowding of facilities (10%), and increased crime and drugs (5%).

Statewide: Statewide respondents also identified improved economic conditions as being the top advantage of increased tourism in their community (84%). In terms of disadvantages, crowding was of concern to a large portion of statewide respondents (20%), as was more traffic (19%), and stress on facilities and services (15%).

Table 27: Advantages Associated with Increased Tourism

	Cascade County		Statewide	
	Number of Responses*	Percent of Respondents	Number of Responses*	Percent of Respondents
Economic growth, financial benefit	73	53%	236	84%
Job opportunities	14	10%	--	--
Increase development of attractions	7	5%	--	--
None	5	4%	18	6%
Broaden tax base	4	3%	--	--
More cultural interaction	3	2%	--	--
Attract new residents	2	1%	4	1%
Community pride	2	1%	--	--
Increase awareness of local amenities	2	1%	--	--
More awareness of local issues	1	1%	--	--

* Respondents could offer more than one suggestion (respondent n=101).

Table 28: Disadvantages Associated with Increased Tourism

	Cascade County		Statewide	
	Number of Responses*	Percent of Respondents	Number of Responses*	Percent of Respondents
None	30	22%	37	13%
Increased traffic	21	15%	53	19%
Crowding of facilities	14	10%	57	20%
Increased crime, drugs	7	5%	11	4%
Low-wage/seasonal jobs	5	4%	--	--
Stress on infrastructure	5	4%	40	15%
Higher cost of living	4	3%	11	4%
Adapting to change	3	2%	--	--
Increased tax burden	3	2%	--	--
Tourists moving here	3	2%	--	--
Visitors don't respect area	2	1%	--	--
Overbuilding of hotels, motels	2	1%	--	--
Little entertainment for tourists	1	1%	--	--
Reduced quality of life	1	1%	--	--

* Respondents could offer more than one suggestion (respondent n=93).

Questions Specific to Cascade County

The Cascade County CTAP committee was given the opportunity to include questions specific to the region on the Resident Attitude questionnaire. The responses to these questions and other community-specific items are reported below. With the exception of one question, all of the following are responses to open-ended questions.

Current and Future Attractions in Cascade County

To get a clearer understanding of what Cascade County residents think are notable attractions, respondents were asked to list the places they take visiting friends or relatives for leisure, or places they suggest to visit (Table 29). Nearly half (49%) of the respondents suggested the Lewis and Clark Interpretive Center, while other sizeable responses included the C.M. Russell museum (42%), and Giant Springs State Park (36%). At least 11 percent of the respondents suggested the top nine different county attractions.

Table 29: Attractions to Take Visiting Friends and Relatives

	Number of Responses*	Percent of Respondents
Lewis and Clark center	67	49%
C.M. Russell museum	58	42%
Giant Springs State Park	50	36%
Paris Gibson square	25	18%
Ryan Dam, other dams	22	16%
Ulm Pishkun State Park	20	14%
Rivers and lakes	18	13%
River's edge trail	16	12%
Museums	15	11%
City and state parks	8	6%
Shopping, dining	8	6%
Waterfalls	7	5%
Fort Benton	5	4%
Heritage center	5	4%
Baseball games	4	3%
Downtown Great Falls	4	3%
Mountains	4	3%
Gates of the Mountain	3	2%
Glacier National Park	3	2%
Rainbow falls	3	2%
Ski areas	3	2%
State fair	3	2%
Yellowstone National Park	3	2%
County drives	2	1%
Golfing	2	1%
Monarch area	2	1%
Tourist center	1	1%

* Respondents could offer more than one suggestion (respondent n=122).

Respondents were also asked about the types of attractions that have the greatest potential for attracting visitors and getting them to return (Table 30). Outdoor recreation generated the largest response (73%), followed by museums and cultural centers (70%), and natural areas (63%). Just three percent thought that none of these attraction categories have the greatest potential for attracting visitors.

Table 30: Attractions with Greatest Potential for Visitors

Attraction Category	Number of Responses*	Percent of Respondents
Outdoor recreation	95	73%
Museums and cultural centers	91	70%
Natural areas	82	63%
Historical and heritage	80	61%
Sporting events	75	58%
Arts and culture	66	51%
Other	29	22%
None of these	4	3%

* Respondents could offer more than one suggestion.

In addition to selecting the attraction type, the respondents were cued to suggest specific attractions that fit in the particular attraction categories as shown above. The following tables (31-37) show the attraction category, what the suggestions are, as well as the total counts for each.

Table 31: Outdoor Recreation Attractions

Attraction	Number of Responses*	Percent of Respondents
Fishing, boating on the Missouri River	45	33%
Hunting	25	18%
Skiing	19	14%
Camping	8	6%
Hiking	8	6%
River's edge trail	6	4%
Parks, state parks	3	2%
Biking areas	2	1%
Golf	2	1%
Lewis and Clark related	2	1%
Waterslide	2	1%
Soccer fields	1	1%

* Respondents could offer more than one suggestion (respondent n=76).

Table 32: Museums and Cultural Centers Attractions

Attraction	Number of Responses*	Percent of Respondents
C.M. Russell museum	33	24%
Lewis and Clark center	22	16%
Paris Gibson square	7	5%
Heritage center	2	1%
Historical society	2	1%
Our 8 museums	2	1%
Ulm Pishkun state park	1	1%

* Respondents could offer more than one suggestion (respondent n=66).

Table 33: Natural Areas Attractions

Attraction	Number of Responses*	Percent of Respondents
Giant Springs state park	23	17%
Missouri River	11	8%
Ulm Pishkun state park	7	5%
Rivers	6	4%
Ryan Dam	6	4%
Mountains	5	4%
Parks	5	4%
Glacier NP	4	3%
River's edge trail	3	2%
Yellowstone NP	3	2%
Lakes	2	1%

* Respondents could offer more than one suggestion (respondent n=59).

Table 34: Historical and Heritage Attractions

Attraction	Number of Responses*	Percent of Respondents
Lewis and Clark center	45	33%
C.M. Russell museum	6	4%
Historical society	2	1%
Lewis and Clark trail	2	1%
Native American events	2	1%
Paris Gibson square	2	1%
Fort Benton	1	1%
Ulm Pishkun state park	1	1%
Dinosaur digs	1	1%

* Respondents could offer more than one suggestion (respondent n=63).

Table 35: Sporting Events Attractions

Attraction	Number of Responses*	Percent of Respondents
Baseball	20	14%
Tournaments, competitions	13	9%
Soccer	12	9%
Basketball	9	7%
Football	7	5%
Auto racing	6	4%
Hockey	4	3%
Ice skating	3	2%
Rodeo	3	2%
Fishing	2	1%
Horse racing	2	1%
Boxing	1	1%
Golf	1	1%
Shooting sports	1	1%

* Respondents could offer more than one suggestion (respondent n=63).

Table 36: Arts and Culture Attractions

Attraction	Number of Responses*	Percent of Respondents
C.M. Russell museum, exhibits	21	15%
Paris Gibson square	12	9%
CMR art auction	10	7%
Concerts	5	4%
Lewis and Clark related	5	4%
Art shows	3	2%
Native American culture	2	1%
Flea market	1	1%
Museums	1	1%
Plays	1	1%
State fair	1	1%

* Respondents could offer more than one suggestion (respondent n=51).

Table 37: Other Attractions

Attraction	Number of Responses*	Percent of Respondents
River's edge trail	3	2%
Shopping	3	2%
State fair	2	1%
Big events	1	1%
Children's museum	1	1%
C.M. Russell museum	1	1%
Craft shows	1	1%
Dog shows	1	1%
Drag racing	1	1%
Good hotels	1	1%
Scenery	1	1%
Sports complex	1	1%

* Respondents could offer more than one suggestion (respondent n=31).

Besides asking about attractions with the greatest potential, respondents were also queried about how existing events could be enhanced to increase attendance of both visitors and residents (Table 38). The most common response was better advertising and promotion (21%), followed by lowered fees and prices (9%), and increasing event admission capacity (5%).

Table 38: Enhancing Existing Events

	Number of Responses*	Percent of Respondents
Better advertising, promotion	29	21%
Lower fees, prices	12	9%
Increase event admission capacity	7	5%
Need new events center (like Billings' Metro)	5	4%
Better event coordination, scheduling	4	3%
Remodel/replace Four Seasons Arena	4	3%
Attract big name entertainment	3	2%
No charge for locals	2	1%
Better personnel training	1	1%
Clean up Expo Park	1	1%
Free events	1	1%
Hotel/concert packages	1	1%
Interest all ages	1	1%
More family events	1	1%
More tourist-friendly oriented	1	1%

* Respondents could offer more than one suggestion (respondent n=68).

Respondents were asked about future arts and cultural activities that could attract more visitors to Cascade County (Table 39). These activities could include both ongoing and one-time events. The activities with the most responses included music concerts and festivals (18%), and Lewis and Clark events and festivals (17%). Art auctions was the third highest chosen activity at 7 percent.

Table 39: Future Arts and Cultural Activities

	Number of Responses*	Percent of Respondents
Music concerts, festivals	25	18%
Lewis and Clark events, festivals	23	17%
Art auctions	9	7%
Art shows, exhibits	7	5%
Sporting events	7	5%
Fairs	6	4%
Theater, plays	5	4%
Craft shows	1	1%
Film festival	1	1%
Gun show	1	1%
Tour of antique shops	1	1%

* Respondents could offer more than one suggestion (respondent n=70).

In contrast to asking residents about what types of attractions and activities that have tourism development potential, respondents were asked about areas that should not be promoted (Table 40). The top choice at 14 percent was “none,” or that no areas should be off limits to promotion. Fishing areas and the Missouri River followed at 3 percent each.

Table 40: Areas that Should Not be Promoted

	Number of Responses*	Percent of Respondents
None	20	14%
Fishing	4	3%
Missouri River	4	3%
Ninth street bridge	3	2%
Gambling, casinos	3	2%
Bootlegger trail	1	1%
Difficult winter activities	1	1%
Smith River	1	1%

* Respondents could offer more than one suggestion (respondent n=58).

Impressions of Great Falls

Cascade County residents were asked about the first impression they have upon entering downtown Great Falls (Table 41). A total of 107 comments were made regarding this question and respondents could offer more than one comment. Interestingly, the top response is that Great Falls has poorly designed parking and streets (14%). However, the second top choice was that it is a clean and well-kept town (11%) while other respondents think it is an old, poor, and run-down town (10%). Taking all the responses on the whole, it seems that the survey respondents do not have a very favorable impression of downtown Great Falls, although there are several positive comments about the city.

Table 41: Impressions of Great Falls

Impressions	Number of Responses*	Percent of Respondents
Poorly designed parking, streets	19	14%
Clean, well-kept town	15	11%
Old, poor, run-down town	14	10%
Quiet, lack of activity	13	9%
Dying, dead	10	7%
Vacant buildings, lack of business	10	7%
Trying to improve	5	4%
Lots of small stores, pawn shops	4	3%
Nice architecture, character	4	3%
General good impression	3	2%
Too many casinos	3	2%
Friendly town	2	1%
All old stores are gone	1	1%
Too many street people	1	1%

* Respondents could offer more than one suggestion (respondent n=107).

Limits to Tourism Development in Cascade County

Lastly, Cascade County residents were asked about limits or hindrances to tourism development in the county (Table 42). A majority (62%) thinks that limits or hindrances to tourism development in Cascade County do exist, while 38 percent do not. The limit or hindrance expressed the most was community and/or people's attitudes (9%), after that current business and government leaders, and then lack of entertainment and facilities (7% each). As evidenced by the low percentages of each response (none reached 10 percent), there appears to be a lack of clear consensus on what specifically limits or hinders tourism development in the county.

Table 42: Limits and Hindrances to Tourism Development

Do you see anything limiting or hindering tourism development in Cascade County?	Yes	No
	62%	38%

If yes, please specify	Number of Responses*	Percent of Respondents
Community, people's attitudes	12	9%
Current business and government leaders	9	7%
Lack of entertainment, facilities	9	7%
Lack of money	7	5%
Little marketing, promotion of area	5	4%
Environmentalists	4	3%
Fear of change	4	3%
Taxes	4	3%
Narrow-mindedness	3	2%
Casinos	2	1%
Conservative viewpoints	2	1%
Bad economy	2	1%
Government regulations	2	1%
Limited transportation	2	1%
Politics	2	1%
No jobs	1	1%
No opportunities	1	1%
Did not specify	10	7%

* Respondents could offer more than one suggestion (respondent n=75).

At the end of the questionnaire, survey respondents were free to include any additional comments they had regarding tourism in Cascade County. Responses were quite varied and are included in Appendix B at the end of this report.

Appendix A: Cascade County Survey Instrument

Resident Attitudes Toward Tourism in Cascade County



Fall 2003

**Institute for Tourism and Recreation Research
The University of Montana
32 Campus Drive #1234
Missoula, MT 59812-1234**

1a How much contact do you have with tourists visiting Cascade County? Please ☒ only one.

☐ Frequent contact ☐ Somewhat frequent contact ☐ Somewhat infrequent contact ☐ Infrequent contact

1b Which of the following statements best describes your behavior toward tourists in Cascade County? Please ☒ only one.

☐ I enjoy meeting and interacting with tourists. ☒ I am indifferent about meeting and interacting with tourists. ☐ I do not enjoy meeting and interacting with tourists.

1c Which of the following statements best describes your job? Please ☒ only one.

☐ I currently do not have a job. ☐ My place of work provides the majority of its products or services to tourists or tourist businesses. ☒ My place of work provides at least part of its products or services to tourists or tourist businesses. ☐ My place of work provides none of its products or services to tourists or tourist businesses.

1d Compared to other industries, how important a role do you think tourism should have in Cascade County? Please ☒ only one.

☐ No role ☐ A minor role ☐ A role equal to other industries ☐ A dominant role

1e What types of economic development would you like to see in Cascade County? Please rank options 1 through 8, with 1 being the most desired.

Mining	<input type="checkbox"/>	Agriculture/Agribusiness	<input type="checkbox"/>
Wood Products	<input type="checkbox"/>	Retail/Wholesale Trade	<input type="checkbox"/>
Manufacturing	<input type="checkbox"/>	Services (health, businesses, etc.)	<input type="checkbox"/>
Tourism/ Recreation	<input type="checkbox"/>	Technology	<input type="checkbox"/>

1f In your opinion, how is the population changing in Cascade County? Please ☒ only one.

☐ Population is not changing (please skip to PART 2) ☐ Population is increasing ☐ Population is decreasing

1g If you feel the population of Cascade County is changing, how would you describe the change? Please ☒ only one.

☐ Too fast ☐ About right ☐ Too slow

2a What type of attractions in Cascade County have the greatest potential for attracting visitors and getting them to return? Please ☒ all that apply and specify in the adjoining box.

- [illegible]

2b Where in Cascade County do you take visiting friends and relatives for leisure or, where do you suggest they visit within the county?

2c Do you see anything limiting or hindering tourism development in Cascade County?

☐ No, limits or hindrances do not exist

☐ Yes, limits and hindrances do exist

If yes, please specify:

2d What future arts and cultural activities could attract visitors to Cascade County? Please include both ongoing or one-time events.

2e How could existing events be enhanced to increase the attendance of residents and nonresidents?

2f What natural, historical, or cultural areas in Cascade County should not be promoted?

2g What is your first impression upon entering downtown Great Falls?

Part 3. Questions concerning quality of life in your community.

3a Please rate the current condition of each of the following elements of quality of life in Cascade County. Please ☒ only one response for each item.

	Very Poor Condition	Poor Condition	Good Condition	Very Good Condition	Don't Know
Emergency services (police, fire, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Museums and cultural centers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost of living	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety from crime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Condition of roads and highways	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Infrastructure (water, sewer, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Traffic congestion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall community livability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parks and recreation areas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall cleanliness and appearance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3b Please indicate how you think the following elements of quality of life would be influenced if tourism were to increase in Cascade County. Please ☒ **only one response for each item.**

	<i>Negative Influence</i>	<i>Both Positive and Negative</i>	<i>Positive Influence</i>	<i>No Influence</i>	<i>Don't Know</i>
Emergency services (police, fire, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Museums and cultural centers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost of living	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety from crime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Condition of roads and highways	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Infrastructure (water, sewer, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Traffic congestion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall community livability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parks and recreation areas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall cleanliness and appearance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3c Please indicate your level of agreement or disagreement with each of the following statements regarding tourism in Cascade County and in the state of Montana. Please ☒ **only one response for each item.**

	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
I'd rather live in Cascade County than anywhere else.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If I had to move away from Cascade County, I would be very sorry to leave.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I think the future of Cascade County looks bright.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cascade County is a good place for people to invest in new tourism development.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increased tourism would help Cascade County grow in the right direction.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decisions about how much tourism there should be in Cascade County are best left to the private sector rather than the public sector.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(continue on the following page)

3c continued:

Please indicate your level of agreement or disagreement with each of the following statements regarding tourism in Cascade County and in the state of Montana. Please ☒ only one response for each item.

	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
There is adequate undeveloped open space in Cascade County.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am concerned about the potential disappearance of open space in Cascade County.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I would support land use regulations to help manage types of future growth in Cascade County.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tourism promotion by the state of Montana benefits Cascade County economically.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If tourism increases in Cascade County, my income will increase or be more secure.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I will benefit financially if tourism increases in Cascade County.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I support continued tourism promotion and advertising to out-of-state visitors by the state of Montana.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I believe jobs in the tourism industry offer opportunity for advancement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vacationing in Montana influences too many people to move to the state.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In recent years, Montana is becoming overcrowded because of more tourists.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If tourism increases in Montana, the overall quality of life for Montana residents will improve.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tourism increases opportunities to meet people of different backgrounds and cultures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tourists do not pay their fair share for the services they use.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I believe most of the jobs in the tourism industry pay low wages.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The overall benefits of tourism outweigh the negative impacts.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3d In your opinion, what is the primary advantage of increased tourism in Cascade County?

3e In your opinion, what is the primary disadvantage of increased tourism in Cascade County?

PART 4. Please tell us a little bit about yourself. Keep in mind that this survey is completely confidential.

4a How many years have you lived in Cascade County?

4b How many years have you lived in Montana?

4c What is your age?

4d Were you born in Montana? Please ☒ *only one*.

☐ Yes

☐ No

4e What is your gender? Please ☒ *only one*.

☐ Male

☐ Female

4f What is your employment status? Please ☒ *only one*.

☐ Employed

☐ Home maker

☐ Retired

☐ Unemployed or Disabled

4g How many people currently living in your house are employed?

4h If one or more are employed, please use the list below to let us know the type of work held by members of your household. Please ☒ *all that apply*.

☐ Manufacturing

☐ Clerical

☐ Wholesale/retail trade

☐ Restaurant/Bar

☐ Travel industry

☐ Construction

☐ Education

☐ Forestry/forest products

☐ Services

☐ Armed services

☐ Agriculture

☐ Finance, Insurance or Real Estate

☐ Health care

☐ Transportation, Communication or Utilities

☐ Professional

Other:
(Please Specify)

4i Please include any additional comments below.

Thank you for your participation!

Please place your completed questionnaire in the postage-paid envelope and drop it in any mailbox.

Appendix B: Respondent Comments

The following are comments taken from the back page of the Cascade County Resident Attitude Survey. The comments are given verbatim with no interpretation made. Only grammatical corrections have been made where necessary to facilitate understanding, as well as omission of undecipherable handwriting replaced by underscores (_____).

- The only comment I have is the tourist pays their fair share in this state and we DO NOT NEED A SALES TAX to add to their cost for visiting OUR state. Lets keep our state one of the few who do not have a sales tax and maybe we can draw more visitors because of it. Bed tax should also be abolished.
- Tourism is one leg of many in economic development. We need to take advantage and promote the wonderful arts and cultural opportunities community has to offer. We cater to professional people, but we don't "market" the valuable and wonderful quality of life our community has to offer.
- We are retired. Worked in armed services, finance, wholesale/retail and service industries.
- I do volunteer work at the Russell Museum and the Visitor Center in summer months, so have heard many complimentary comments from tourists about the Great Falls area and the tourist attractions we have. We could use more activities to offer tourists - perhaps more river activities. Also, we need a real campground in addition to KOA and Dick's. This is something the county could do.
- The initial impression of Great Falls is not good. Take a video as you drive down 10th ave S, or entering the NW Bypass, coming from I-15. Would you use that video as an advertising video for Great Falls? After you live here and become acquainted with the many things Great Falls/Cascade County has to offer, you are happy to live here.
- Great falls is a retirement city with a big part Air Force. This town will never have positive atmosphere like Billings, Missoula, Bozeman, etc. As long as the base is here. We tore down many historical sites that meant something to the natives. The smoke stack, opera house, the old library, St. Mary's school, many old bars and building downtown that would thrive today. Too many people in Great Falls don't give a damn. From kids all the way up.
- We travel a lot and see how other cities benefit from tourism. We always say why can't we have those things in Great Falls. We also need better restaurants and shopping.
- Great Falls must be willing to change without a total sellout. Look to the future while promoting the past and present.
- Residents are friendly, amiable, courteous.
- We need a sales tax to help reduce our taxes.
- As great as tourism is, we need strong jobs. If you want people to come here, it need to be a destination not a stopping point on the way to Glacier. Waterslide/theme park/ outlet stores/ concerts/ sporting events/ chopper flights/ mazes/ zoos - something different and special.
- I'm all for tourism and the betterment of Cascade County and Great Falls, but that goes beyond. This city is going in the wrong direction. Casinos, pawnshops, casinos, title pawn, more casinos, more hawk shops. Lodging is finally respectable. Restaurants and dining are embarrassing.
- Keep the government off of it.
- I favor making our county and city prime goals for visiting tourists.
- Promoting tourism in Cascade Co. likely is a waste of money. Nothing really around there that people from major population centers would find attractive. Driving about looking at poor folks living in a large wasteland of North America isn't fun.
- I would suggest the money and effort used for this survey could have been better spent in a dozen ways. We don't need a survey for every incident and surely not 2 or 3 copies to make sure everyone answers the survey.
- Montana and its citizenry need more job opportunities - economic development. Increased tourism is just one way to develop and generate capital in the state. Montana has abundant resources to promote to the country, and the world, but when does the average Montanan even see any benefits from increased tourism?
- I don't get out very often and have no friends from out of town visit me. I am 84 years old.
- I think that as long as live horse racing can just "break even", it is a viable source of additional business/income for the people of Great Falls.

- I think a city based ambulance system should be implemented.
- Very vague questionnaire. In order to reach full benefit of tourism the state would need to institute a state sales tax. There are very many parks in the city of Great Falls; someone should look into the sale of some of the land to fund whatever tourism development. Every time we have any type of election a mill levy is voted on the taxpayers of this state are being taxed to death. I have more to say but have run out of room. Thank you.
- I would like to see more indoor recreation promoted. Our new wave pool cost a lot of money and can only be used about 2 and half months a year. The same kind of indoor facility could be used year round. A facility could include a park like atmosphere with plants and quiet areas and plenty of activity areas for children and teens, such as skating. I'm delighted that our soccer field bond passed.
- The highway system between Billings and Great Falls. Have to be four lanes. I travel in a motor home for years, still own one.
- If we had a right to work law in Montana we would see much faster development and growth. Also more business.
- Don't talk, do something. "Grouch about it, comes from vision, see it do it."
- We are not a big enough city to warrant large sporting events. We are too far away from any natural beauty. What we have is lots of electricity for manufacturing which would bring outside money into the city. Tourism is seasonal and relies on weather, gas, other attractions in the area.
- The people of Montana have to be happy in Montana and in order to be happy, you want to be successful or at least be able to pay your bills. I have a college degree, I graduated at the top of my class, I wrote a book, I have supported and raised 2 children without any child support. Do you know what I do to earn a living? I clean houses - I work as a maid. Yep, that what college educated people do in Montana. Oh yeah, they also have paper routes. There is nothing here.
- Before we try and bring in more outsiders we need to get our "poop in a group". Every time new industry tries to come here, darn, too high taxes, property values, etc. Our residents are not dumb but the young are leaving for higher paid jobs elsewhere by the droves. Why stay here for \$7.50/hr when elsewhere the same job pays \$11/hr. Get a clue. Tourism will not help all of our problems, maybe make more. We are tired of higher taxes, low pay, and outlandish home prices. Only reason still here is due to failing health of parents. Otherwise, see ya! Too many residents are tired of all the BS when something new wants in, but OK for tourists. Yahoo, new retirement state, what a joke.
- Get rid of the casinos or make them Vegas casinos!
- Cascade County is situated in the perfect location to draw tourism dollars. We can offer cultural and outdoor recreational activities and have the current capacity to host many visitors. The problem lies in the antiquated thought of keeping the outsiders out and stopping any and all reasonable attempts at progress. I am a small business owner paying tax in Montana. As a past resident of Nebraska, I know that I could save approximately 8% overall in tax payments if I were to move. I am in the capacity to say that I am part of the life giving blood that flows through our community but if conditions do no change, I will be forced to move.
- When anyone wants to start or promote new attractions they run into too many obstacles. Taxes too high. What happened to the water slides someone wanted to put in on Smelter Hill? The city added slides to theirs but how much more tourism would have come to GF if it had been a big one on Smelter Hill?? And what happened to the idea of a Wildlife Refuge where you could see animals roaming free.
- We need more mining and timber jobs and less environmentalists. Also a large enclosed dome shaped building to play sports in. Build it and they will come!
- You have to be hardy. A true pioneer spirit to live here. Employers don't care about their employees, only part-time jobs with no benefits. The wages aren't enough to live on. You can't make a life here and you can't achieve. This is a depressed state with depressed people. I would never recommend for anyone to come here unless you want to struggle every single day of your life. Nothing is easy here. There is no growth. It is extremely hard to live here and only reason we are here is because of our family.
- Thank you for the chance to voice my concerns. Hope you find it useful, Good luck!
- Cascade County talks a good talk but where the rubber meets the road they fall down. Like the idea about having a motor sports complex built. But after studies upon studies Billings built a complex before Cascade County got done thinking about it. We hear all about these good things coming, malting plant, gas fired power

plant, alcohol plant. Mostly talk. Why do other cities like Billings, Helena, and Missoula get these things. Cascade County needs to give these things some consideration and/or incentive to get these projects going. Cascade County needs to get its head out of the sand and grab a vision for the future. Great Falls is going backwards, needs a vision!!

- I feel that fishing licenses for out of state residents should be more limited.
- In my opinion Cascade County and the city of Great Falls have a very limited and narrow perspective. I believe for any community or city, to maintain a healthy growing economy, must be productive. The leadership in this county and city reject and or discourage industry. They are more concerned about clean air and a stagnant status quo complacency. It appears they are satisfied to be a service-oriented community, depending primarily on the Malmstrom Airbase, Medical care, and the school system. These are all tax-supported projects in one form or another. This creates a heavy tax burden on the property owner of this county. This philosophy has a strong tendency for the young generation to leave the community to seek employment and better living conditions elsewhere.
- Please let the race fans, cars and horses, have a complex.
- Bring things to Montana that will make our young people stay here. As it is now they all want to leave after graduation because on job related opportunities. Use local talents of jobs instead of hiring out of state.
- We need to clean up the county. Especially Black Eagle and fix roads. Tourists don't want to come to run down places. They want places to look clean, relaxing and pretty. A lot of people come to Black Eagle for dinner and golf and events at the community center.
- I believe trying to grow tourism is a good thing. However, I do not believe this will significantly increase the growth of Great Falls or Cascade County. We need to attract good paying manufacturing and or technical jobs, which truly expand the economy. We can not be afraid of this type of growth.
- When I was growing up in Billings, Great Falls was the big city. Now Billings is far ahead of us. Great Falls needs to be more business friendly and aggressively pursue growth. There has to be something with city and county government for Great Falls to be stagnant while Billings, Missoula, Bozeman, and other towns are booming.
- I moved to Great Falls in 1954. I worked at the Petite Shop for 10 years. Got injured in a car accident and had to have a spinal repair and couldn't continue standing all day. I brushed up on my typing skills and was a legal secretary until July 1987. I love Great Falls and due to old age don't drive out of town anymore or keep up on dancing and other travels anymore. Hope I have answered all of your questions in good taste. Thank you.
- I always thought a zoo, aquarium, indoor gardens. A go-cart track in summer and cross-country skiing in winter on the old anaconda property would be nice. Two of my children moved to Idaho for work and one relocated to Reno, NV also for work and they all talk of things in their new homes and said why could Great Falls not have had that when they were growing up here.
- Have always intended to stay and retire in MT, but due to increased taxes and utilities and no increase in yearly income may need to sell our home and relocated.
- I moved to Montana from narrow-minded northern New England one year ago. I thank God every morning that I am in friendly welcoming Montana. I think Montana should share its natural beauty and friendly way of life with tourists from all over the world.
- All the politicians talk about making more jobs but none do it. If we used some of the coal trust money to build windmills we could sell the energy and help Montana. We let all the big jobs done here like the Falls grounds and construction jobs go to people out of Great Falls and even out of state people.
- This state continues to provide a negative public/private atmosphere. Government interference with private companies or government competition with private services continues to impede growth.
- NO MOTORSPORTS COMPLEX in Great Falls!! Regardless of the kind of economic development that occurs, the MOST important thing to me is to maintain the quality of our environment. That means protecting water quality and conserving water resources (including groundwater), controlling air pollution, preserving open space (avoiding sprawl!) protecting wildlife habitats and encouraging sustainable ecological management of public lands. Value-added industries, like the pasta plant, are good ideas, but industries that use lots of water don't make sense for a semi-arid landscape.